



# Medi-Cal Rx Finance Portal Job Aid

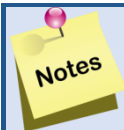
---

January 19, 2022

*This job aid is intended to be used for training purposes. The images provided in this job aid contain test data and are not true business scenarios but are intended to provide visual reference of how the screens will appear.*

## 1.0 Overview

The Medi-Cal Rx Finance Portal allows users to maintain claim payment methods (paper check vs. Electronic Funds Transfer [EFT]) via the EFT tab, to maintain remittance advice (RA) format preferences (Electronic Data Interchange [EDI] 835 vs. Paper/PDF) via the Electronic Remittance Advice (ERA) tab, and to view and download files and documents once posted. The Delegated Administrator (Del Admin) can grant access to the Medi-Cal Rx Finance Portal for Standard Users working on their behalf by assigning role permissions within the User Administration Console (UAC).



- The functionality available to a given user depends on the permissions granted by the Del Admin.

## 2.0 Registration Process

A Del Admin must be registered to access the Medi-Cal Rx Finance Portal. To register, follow the process described in the [User Administration Console \(UAC\) Quick Start Guide](#). The Del Admin can then grant either full access (Finance Portal Full Access) or 835 File Access to Standard Users. See the table below.

Application	Role Title	Access
Medi-Cal Rx Finance Portal	Finance Portal Full Access	Finance Portal Full Access: Grants full access to view and edit EFTs and ERAs as well as Document Search. Includes 835 and RA, and 2022 1099s will be available in January 2023.
	835 File Access	835 File Access: Grants access to Document Search ONLY, which includes searching for 835, RA, and 2022 1099s will be available in January 2023.

Users can also reach out to the Medi-Cal Rx Education and Outreach team at [MediCalRxEducationOutreach@magellanhealth.com](mailto:MediCalRxEducationOutreach@magellanhealth.com) for registration assistance.

## 3.0 Logging in to the Medi-Cal Rx Finance Portal

Once registered with a user ID and password, users can log in to the Medi-Cal Rx Finance Portal by following the instructions below:

1. Access the [Medi-Cal Rx Web Portal](#).
2. Select the **Provider Portal** icon. See *Figure 3.0-1*.

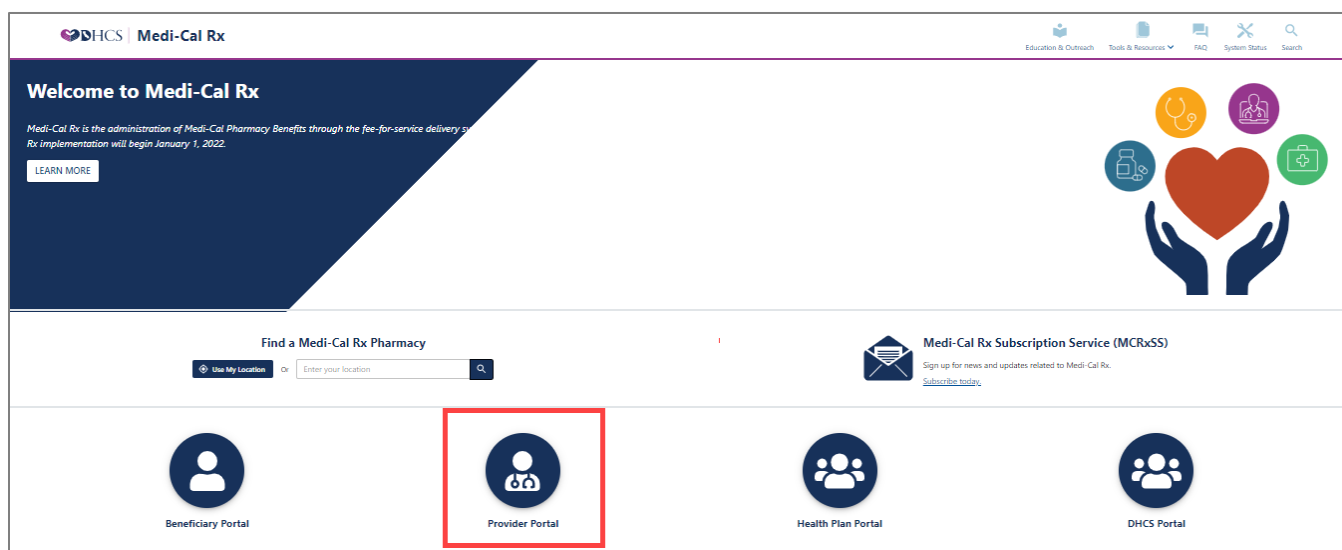


Figure 3.0-1: Medi-Cal Rx Web Portal – Provider Portal Icon

3. Click the **Log In** button. See *Figure 3.0-2*.

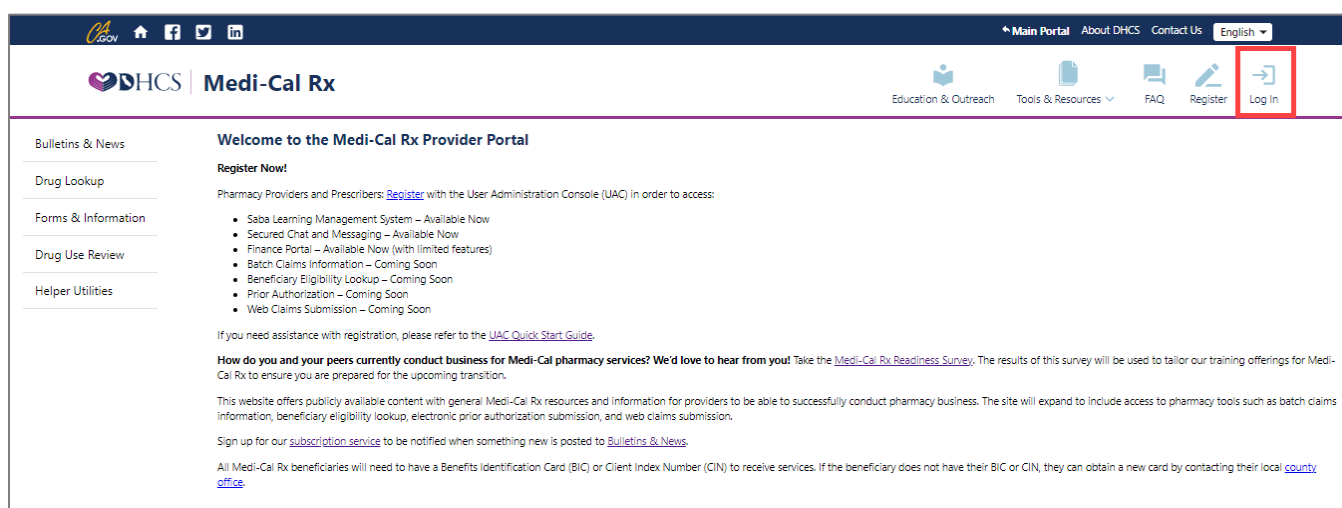


Figure 3.0-2: Medi-Cal Rx Provider Portal – Log In

4. Enter the email address with which you registered and the password sent to you during the registration process. See *Figure 3.0-3*.

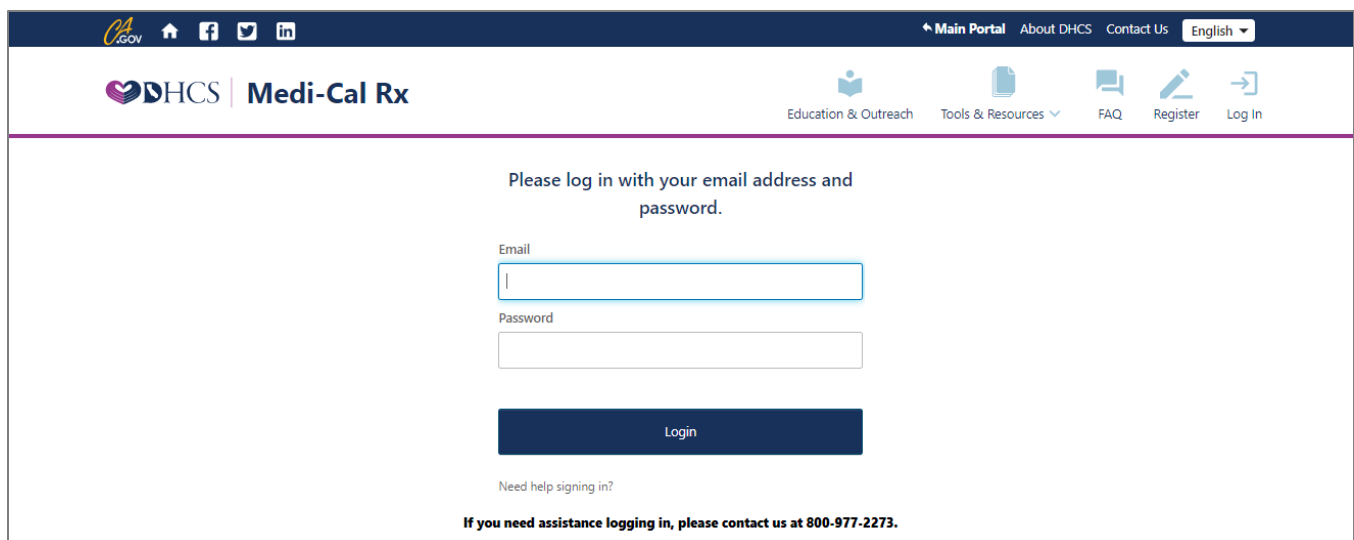


Figure 3.0-3: Log In

5. Click the **Log In** button.
6. Select the **Finance Portal** link from the menu on the left side of the page. See *Figure 3.0-4*.

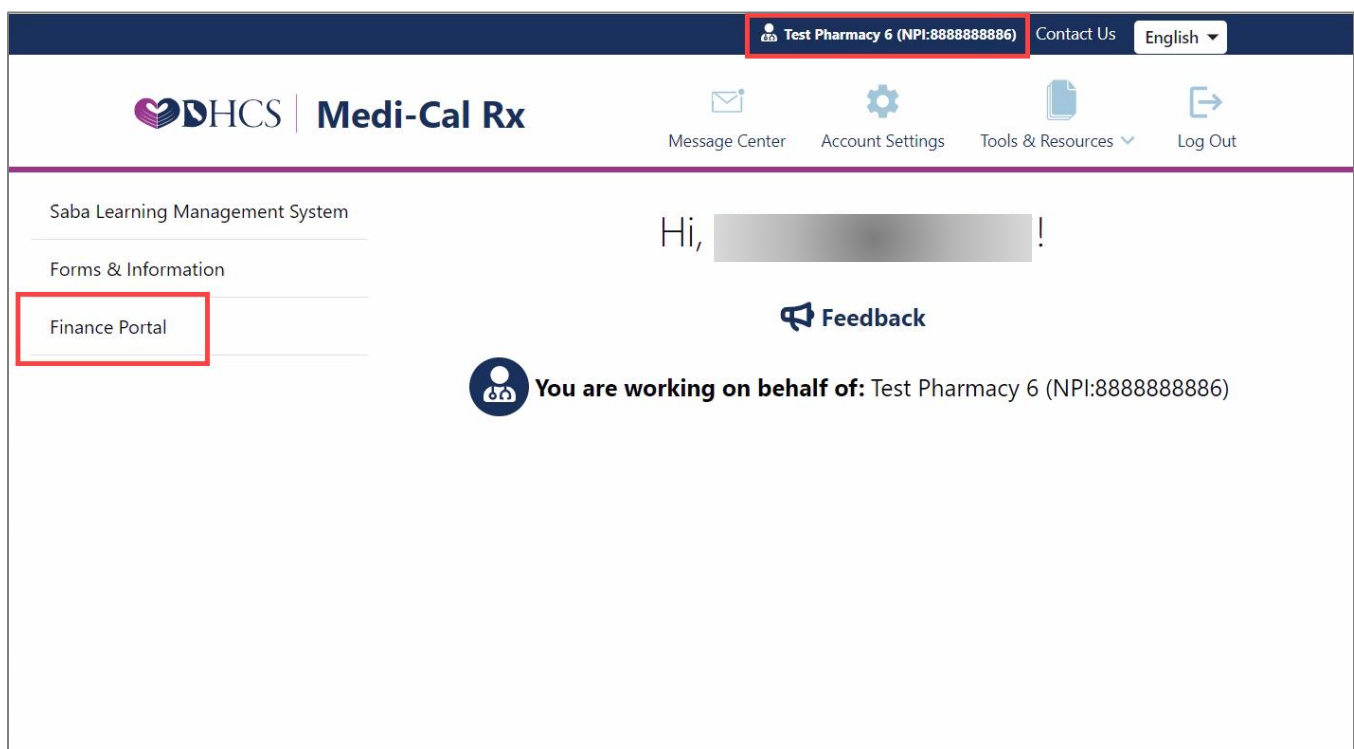


Figure 3.0-4: Medi-Cal Rx Secured Provider Portal

7. This will take you to the Medi-Cal Rx Finance Portal. See *Figure 3.0-5*.

## Welcome to the Medi-Cal Rx Finance Portal

Where you can sign up or make changes to Electronic Funds Transfer (EFT) or Electronic Remittance Advice (ERA) and view Electronic Remittance Advices once posted.

Medi-Cal Rx is happy to provide our participating pharmacies with the opportunity to receive payment electronically via Automated Clearing House (ACH) for prescriptions they dispense. Pharmacies that are not signed up for electronic payment will receive a paper check to the address on file. To update the address access <https://www.dhcs.ca.gov/provgovpart/Pages/PED.aspx>. In order to sign up to receive payments directly via ACH, please click the link (EFT [here](#)).

Medi-Cal Rx is happy to provide our participating pharmacies with the opportunity to receive Electronic Remittance Advice (ERA) that will include payment details for each prescription dispensed to enroll in ERA click the link (ERA [here](#)). Providers can designate an entity to receive an ERA (HIPAA 835 Transaction). The Receiver can be an outside party such as a billing service or clearinghouse. Your access to the ERA will only be granted once payment is made. You will not have access until your client has included you as a designated user to designate an entity to receive an ERA (HIPAA compliant 835 Transaction) click <https://uacqa.magellanrx.com/>.

**Figure 3.0-5: Medi-Cal Rx Finance Portal**

## 4.0 Maintain Payment Method (EFT or Paper Check)

### Activities Within the Medi-Cal Rx Finance Portal

After a user signs in to the Medi-Cal Rx Finance Portal, they can complete the following activities related to EFT.

1. Set Up EFT.
2. View EFT Submission.
3. Change or Cancel EFT.



- Pharmacies that are not signed up for electronic payment will receive a paper check mailed to the Pay To address on file with Medi-Cal Rx.

#### 4.1 Set Up EFT

Users with "Finance Portal Full Access" are able to use the Medi-Cal Rx Finance Portal to set up an Automated Clearing House (ACH) EFT record to receive their payment electronically. Below are instructions to set up an EFT record.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Select the **EFT** option. There are three sections that need to be filled out.
  - a. EFT Provider Information
  - b. EFT Financial Institution Information
  - c. EFT Submission Information
3. National Provider Identifiers (NPIs) that are not associated with a chain are listed in the **EFT Provider Information** section. See *Figure 4.1-1*.

finqaprovidertestuser finqaprovidertestuser Contact Us Return to Dashboard

DHCS | Medi-Cal Rx Document Search **EFT** ERA View Submissions

1 Provider Information 2 Financial Institution 3 Submission Information

EFT Provider Information Hide


SEARCH: Search Providers 1 - 3 of 3 < > 10

Select All	Type	NPI	Owner ID	Pharmacy	Export to Excel
<input type="checkbox"/>	Provider	1497848832	02	SCRIPTDASH	View Details
<input type="checkbox"/>	Provider	1023279015	02	OC PHARMACY	View Details
<input type="checkbox"/>	Provider	1427486554	01	INTOUCH PHARMACY LLC	View Details

EFT Financial Institution Information Show

EFT Submission Information Show

Figure 4.1-1: EFT Provider Information – Not Associated with a Chain

 Notes

- Chain pharmacies can click the View NPIs button to view and select from all associated NPIs in the EFT Provider Information section. See Figure 4.1-2.


ChainOnly Fullaccess Contact Us Return to Dashboard

DHCS | Medi-Cal Rx Document Search **EFT** ERA View Submissions

1 Provider Information 2 Financial Institution 3 Submission Information

EFT Provider Information Hide

SEARCH: Search Providers 1 - 1 of 1 < > 10


Type	Chain ID	Pharmacy	Export to Excel
 Chain	207	CVS PHARMACY IN TARGET	View NPIs

EFT Financial Institution Information Show

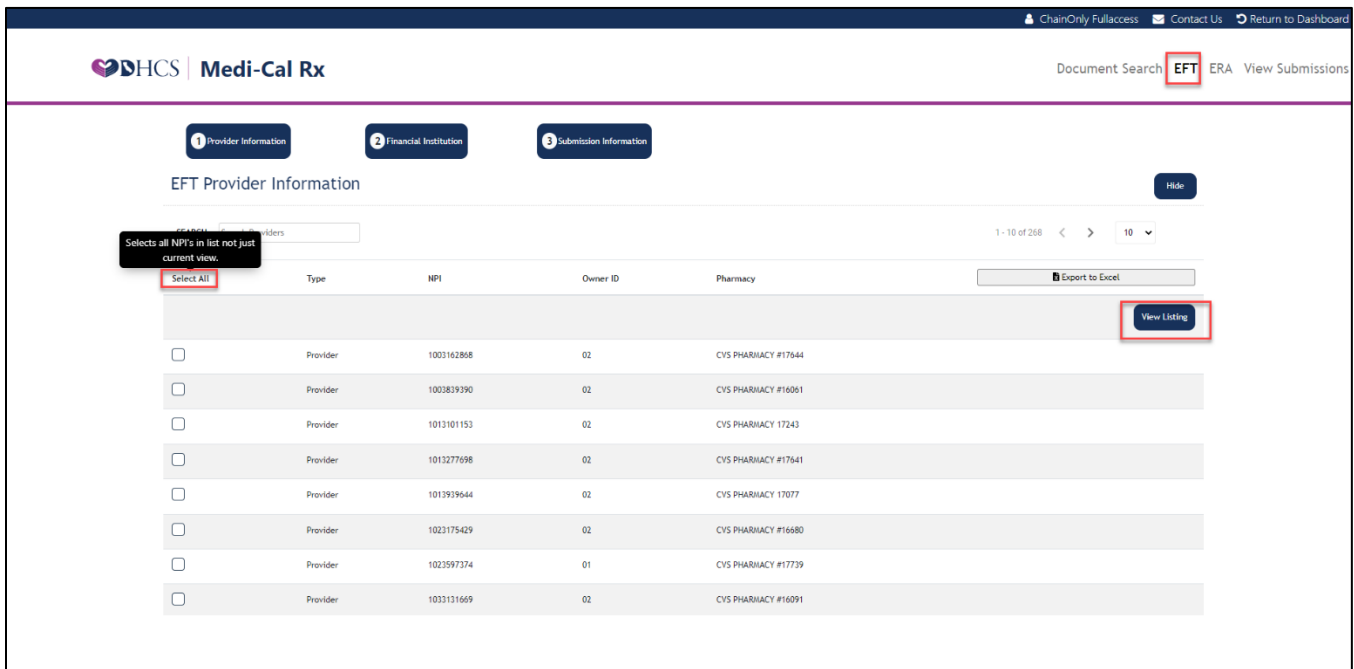
EFT Submission Information Show

Figure 4.1-2: EFT Provider Information – Chains

4. Select the **Select All** link at the top of the left-hand column to select all NPIs or select the check box next to one or more individual NPIs for which you want to set up EFT. Note that using the **Select All** link will select all returned NPIs, not only those currently showing on the screen. See *Figure 4.1-3*.



- You can select the View Listing button to collapse the list and return to the Chain ID. See *Figure 4.1-3*.



The screenshot displays the 'EFT Provider Information' section of the DHCS Medi-Cal Rx portal. At the top, there are three tabs: '1 Provider Information', '2 Financial Institution', and '3 Submission Information'. The 'Provider Information' tab is active. Below the tabs, there is a search bar and a 'Hide' button. A table lists NPIs with columns for 'Type', 'NPI', 'Owner ID', and 'Pharmacy'. A 'Select All' link is highlighted in the top left of the table, and a 'View Listing' button is highlighted in the top right. A tooltip explains that 'Select All' selects all NPIs in the list, not just the current view.

Type	NPI	Owner ID	Pharmacy
Provider	1003162868	02	CVS PHARMACY #17544
Provider	1003839390	02	CVS PHARMACY #16061
Provider	1013101153	02	CVS PHARMACY 17243
Provider	1013277598	02	CVS PHARMACY #17541
Provider	1013939644	02	CVS PHARMACY 17077
Provider	1023175429	02	CVS PHARMACY #16580
Provider	1023597374	01	CVS PHARMACY #17739
Provider	1033131669	02	CVS PHARMACY #16091

**Figure 4.1-3: EFT View NPIs Screen**

5. In the **EFT Financial Institution Information** section, fill out all the required fields. Required fields are indicated by a red asterisk (\*) as shown in *Figure 4.1-4*.
  - a. **Note:** Hovering the mouse over the (?) next to each field will provide guidelines for the field.



**EFT Financial Institution Information** Hide

**Financial Institution Name:**

**Financial Institution Routing Number:**  9 digit minimum

**Confirm Routing Number:**

**Type Of Account at Financial Institution:** ☐ Checking ☐ Savings

**Provider's Account with Financial Institution:**

**Confirm Account Number:**

**Privacy Statement (Civil Code Section 1798 et seq.):**  
 The information requested on this form is required by the Department of Health Care Services for purposes of identification and document processing. Furnishing the information requested on this form is mandatory. Failure to provide the mandatory information may result in your request being delayed or not processed.

**Figure 4.1-4: EFT Financial Institution Information**

- Fill out all required fields in the **EFT Submission Information** section. See *Figure 4.1-5*.

**EFT Submission Information** Hide

**Printed Name of Person Submitting Enrollment:**

**Printed Title of Person Submitting Enrollment:**

☐ **By checking this box, I am certifying that I have legal authority to make these changes. I understand that by checking this box, payments issued will be from Federal and State funds, and that any falsification or concealment of a material fact may be prosecuted under Federal and State laws.**

**Submit**

**Figure 4.1-5: EFT Submission Information**

- Click the certification and authorization check box.
- Click **Submit** to submit the EFT request.
- With successful submission, you will get the message shown in *Figure 4.1-6*. Click the **Ok** button to return to the EFT View Submissions screen.

**Successfully saved.**  
 Request has been successfully submitted.

**Ok**

**Figure 4.1-6: Successfully Saved**

10. If one or more fields are incorrectly entered, the fields turn red, and a Validation Failure message appears upon submission. You will need to check the form, make the necessary corrections, and then resubmit.



- Submission of an EFT request is expected to be complete in 3-5 business days. A user will know that a request is effective once the record associated with the request is in an Approved status in the EFT Submissions View.
- Once approved, EFTs can take up to 30 calendar days to take effect in the Medi-Cal Rx checkwrite, dependent upon the timing of the approval in relation to the phase of the Medi-Cal Rx checkwrite cycle.

## 4.2 View EFT Submissions

Users with “Finance Portal Full Access” can view their EFT submissions in the View Submissions section of the Medi-Cal Rx Finance Portal. The View Submissions screen lists each EFT submission and indicates which submissions have been approved, canceled, or changed based on the transaction requests.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Select the **View Submissions** option. The entries for each submission show the information entered by the user or account owner. The screen also shows the status of each submission. See *Figure 4.2-1*.

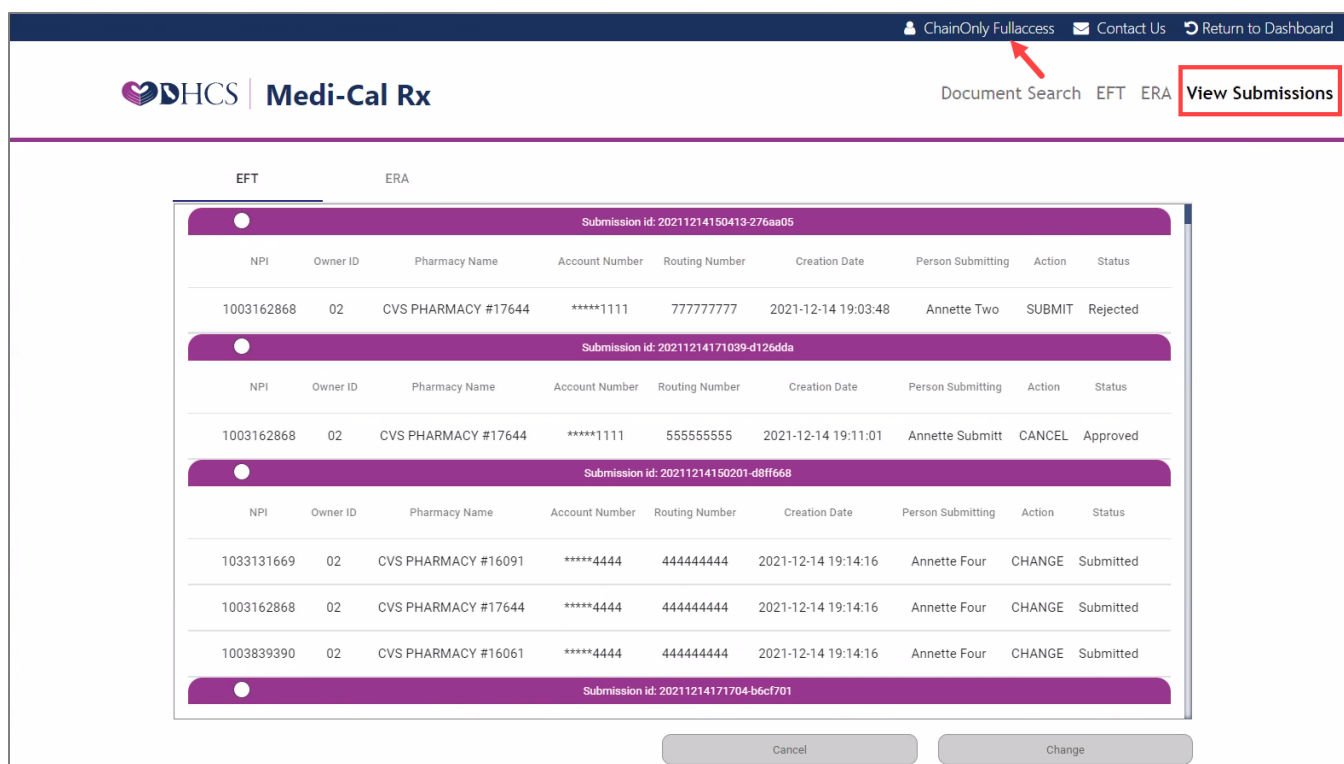


Figure 4.2-1: View Submissions

3. A user can select the **EFT** tab to view the submissions and their status. By selecting the radio button in the Submission ID bar for a given submission, the user can change or cancel the submission as described in *Section 4.3* below.

## 4.3 Change or Cancel EFT

Users with "Finance Portal Full Access" can make a change to or cancel an EFT submission after a request has been submitted. However, there are certain statuses that cannot be changed or canceled as described in the table below. Use the following steps to change or cancel an EFT submission. Once approved, EFTs can take up to 30 calendar days to take effect in the Medi-Cal Rx checkwrite dependent upon the timing of the approval in relation to the phase of the Medi-Cal Rx checkwrite cycle.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Select the **View Submissions** option. This displays a list of submissions that have been entered by the user or account owner. See *Figure 4.3-1*.

ChainOnly Fullaccess
Contact Us
Return to Dashboard

DHCS
Medi-Cal Rx
Document Search
EFT
ERA
View Submissions

EFT
ERA

Submission id: 20211214150413-276aa05

NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
1003162868	02	CVS PHARMACY #17644	*****1111	777777777	2021-12-14 19:03:48	Annette Two	SUBMIT	Rejected

Submission id: 20211214171039-d126dda

NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
1003162868	02	CVS PHARMACY #17644	*****1111	555555555	2021-12-14 19:11:01	Annette Submitt	CANCEL	Approved

Submission id: 20211214150201-d8ff668

NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
1033131669	02	CVS PHARMACY #16091	*****4444	444444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted
1003162868	02	CVS PHARMACY #17644	*****4444	444444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted
1003839390	02	CVS PHARMACY #16061	*****4444	444444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted

Submission id: 20211214171704-b6cf701

Cancel
Change

Figure 4.3-1: View Submissions – EFT Tab

- On the EFT tab, the **Action** and **Status** that appear for each submission determine whether you can cancel or change the submission as described in the table below.

Action	Status	Description
SUBMIT	Submitted	User can change or cancel the submission.
SUBMIT	Pending	User cannot change or cancel as the submission is awaiting a response to the request from the bank.
SUBMIT	Approved	User can change or cancel the submission. The prenote has been approved by the financial institution.
SUBMIT	Rejected	User cannot change or cancel the submission and must submit a corrected record as a new request.
CHANGE	Submitted	User can change or cancel the submission.
CHANGE	Pending	User cannot change or cancel as the submission is awaiting a response to the request from the bank.
CHANGE	Approved	User can change or cancel the submission. The prenote has been approved by the financial institution.

Action	Status	Description
CHANGE	Rejected	User cannot change or cancel the submission and must submit a corrected record as a new request.
CANCEL	Approved	User cannot change or cancel the submission.

- Select the **radio** button in the Submission ID header for the submission you want to change or cancel. See *Figure 4.3-2*.

The screenshot shows the Medi-Cal Rx portal interface. At the top, there's a header with the DHCS logo and 'Medi-Cal Rx' text. To the right, there are links for 'Document Search', 'EFT', 'ERA', and 'View Submissions'. Below this, there are tabs for 'EFT' and 'ERA'. The main content area displays a table of submissions. Each submission is grouped by a purple header bar containing a radio button and the submission ID. The table columns are: NPI, Owner ID, Pharmacy Name, Account Number, Routing Number, Creation Date, Person Submitting, Action, and Status. The third submission (Submission id: 20211214150201-d8ff668) is highlighted, and its radio button is selected (indicated by a red arrow). Below the table, there are two buttons: 'Cancel' and 'Change', which are highlighted with a red box.

Submission ID	NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
20211214150413-276aa05	1003162868	02	CVS PHARMACY #17644	****1111	77777777	2021-12-14 19:03:48	Annette Two	SUBMIT	Rejected
20211214171039-d126dda	1003162868	02	CVS PHARMACY #17644	****1111	55555555	2021-12-14 19:11:01	Annette Submitt	CANCEL	Approved
20211214150201-d8ff668	1033131669	02	CVS PHARMACY #16091	****4444	44444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted
20211214150201-d8ff668	1003162868	02	CVS PHARMACY #17644	****4444	44444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted
20211214150201-d8ff668	1003839390	02	CVS PHARMACY #16061	****4444	44444444	2021-12-14 19:14:16	Annette Four	CHANGE	Submitted

**Figure 4.3-2: View Submissions – EFT Tab**

- In this example, the entry is in a Submitted status. When the radio button is selected, the **Cancel** and **Change** buttons become available. This indicates that you can make changes to or cancel the submission record. If the **Cancel** and **Change** buttons remain grayed out, it means you cannot make any updates to this submission (refer to the table above for more information). See *Figure 4.3-3*.

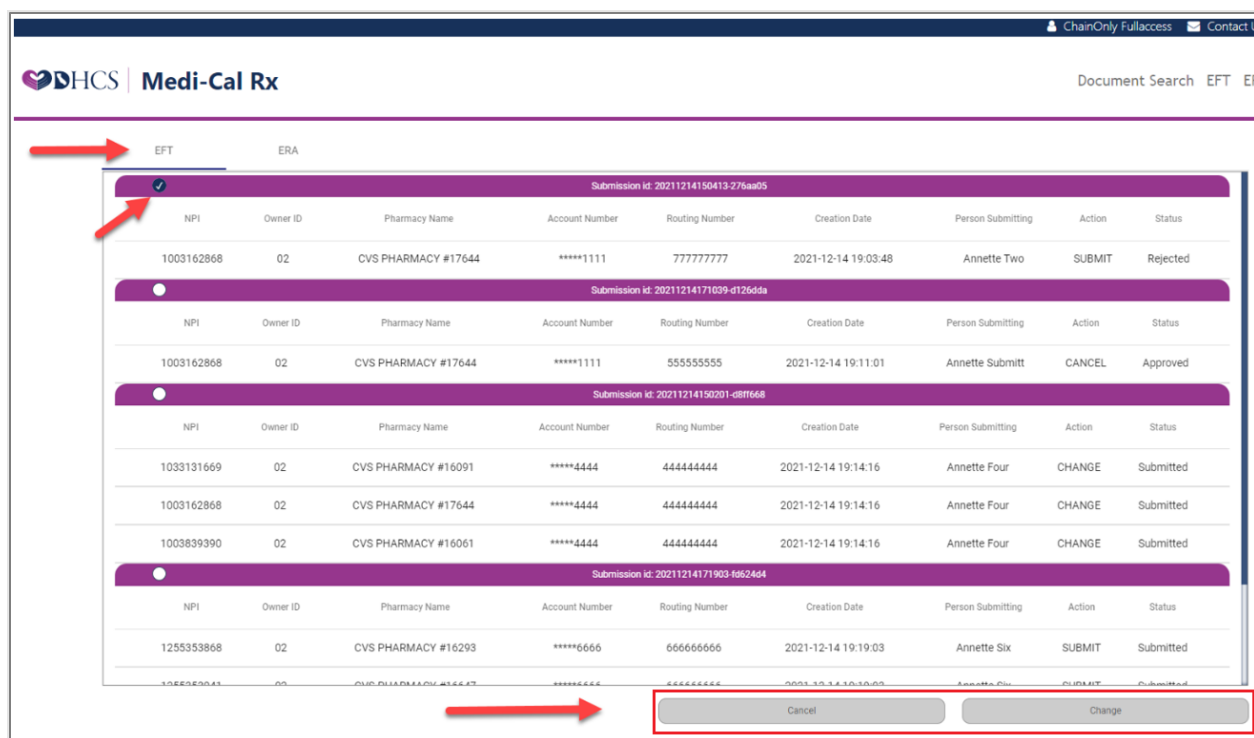
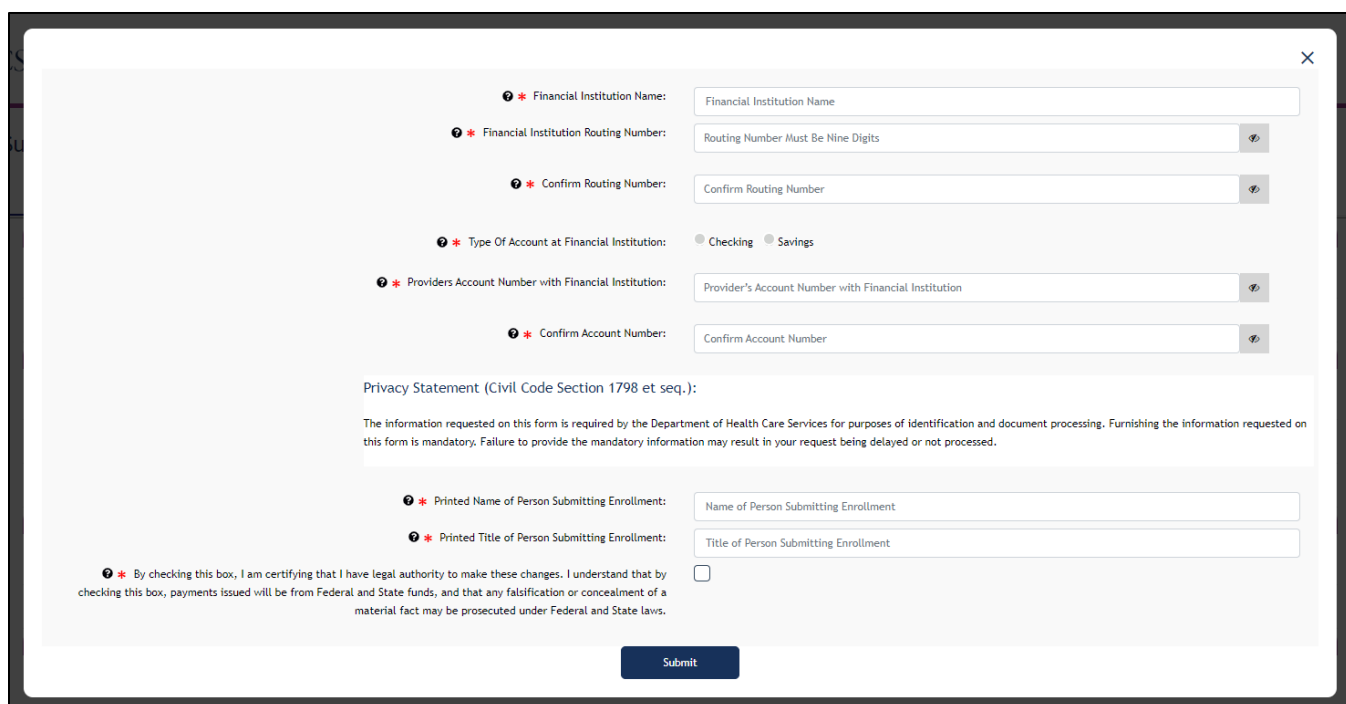


Figure 4.3-3: Grayed Out Cancel and Change Buttons

#### 6. Change EFT Example:

- Click the **Change** button to change the submission. Refer to *Figure 4.3-2*.
- A pop-up window appears allowing the user to change the financial information. See *Figure 4.3-4*.
- Edit the fields as needed to make the change and then click the **Submit** button.



Financial Institution Name:

Financial Institution Routing Number:  Routing Number Must Be Nine Digits

Confirm Routing Number:

Type Of Account at Financial Institution: ☐ Checking ☐ Savings

Providers Account Number with Financial Institution:

Confirm Account Number:

Privacy Statement (Civil Code Section 1798 et seq.):

The information requested on this form is required by the Department of Health Care Services for purposes of identification and document processing. Furnishing the information requested on this form is mandatory. Failure to provide the mandatory information may result in your request being delayed or not processed.

Printed Name of Person Submitting Enrollment:

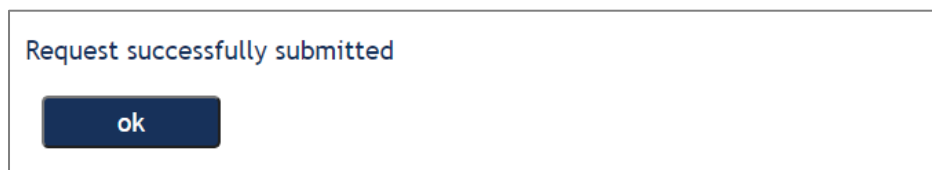
Printed Title of Person Submitting Enrollment:

☐ By checking this box, I am certifying that I have legal authority to make these changes. I understand that by checking this box, payments issued will be from Federal and State funds, and that any falsification or concealment of a material fact may be prosecuted under Federal and State laws.

**Submit**

**Figure 4.3-4: Change EFT Pop-Up Window**

- d. With successful submission, you will get the message shown in *Figure 4.3-5* below. Click the **Ok** button to return to the EFT View Submissions screen where you will see the updated status as shown in *Figure 4.3-6*.



**Request successfully submitted**

**ok**

**Figure 4.3-5: Request Successfully Submitted**

Submission id: 20220107062323-5f9e1f7								
NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
1023279015	02	OC PHARMACY	*****9876	987654321	2022-01-07 08:30:45	Harvey James	CHANGE	Submitted

**Figure 4.3-6: Changed Record**

## 7. Cancel EFT Example:

- Click the **Cancel** button to cancel the submission. Refer to *Figure 4.3-2*.
- A pop-up window will appear as shown in *Figure 4.3-7*. If you select **Yes** to cancel the request, you will see the updated status on the View Submissions screen as shown in *Figure 4.3-8*. If you select **No** on the pop-up window, the record will NOT be canceled, and you will be returned to the View Submissions screen.

Are you sure you want to cancel this Record?

Selecting Yes will cancel all NPIs associated with this Submission Id.

YesNo

Figure 4.3-7: Cancel Confirmation

Submission id: 20211214171039-d126dda								
NPI	Owner ID	Pharmacy Name	Account Number	Routing Number	Creation Date	Person Submitting	Action	Status
1003162868	02	CVS PHARMACY #17644	*****1111	555555555	2021-12-14 19:11:01	Annette Submitt	CANCEL	Approved

Figure 4.3-8: Canceled Record



## 5.0 Maintain RA Delivery Method (EDI 835 or Paper)

### Activities Within the Medi-Cal Rx Finance Portal

After the user signs in and navigates to the Medi-Cal Rx Finance Portal's ERA tab, the user will have the ability to maintain the format desired (EDI 835 or paper) for their Medi-Cal Rx RAs. If the EDI 835 format is not set up for the NPI, the default format of paper is assumed, and the paper RA will be mailed to the Pay To address on file with Medi-Cal Rx. A PDF document of what was mailed is available for download (refer to *Section 6.0*). Once approved, the RA format chosen may take up to 30 calendar days to take effect in the Medi-Cal Rx checkwrite, dependent upon the timing of the update in relation to the phase of the Medi-Cal Rx checkwrite cycle.

1. Set Up ERA.
2. View ERA Submission.
3. Cancel ERA.

### 5.1 Set Up ERA


Users with "Finance Portal Full Access" are able to use the Medi-Cal Rx Finance Portal to set up ERA for the EDI 835 format. Below are instructions to set up ERA.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Select the **ERA** option. There are two sections to fill out.
  - a. ERA Provider Information
  - b. ERA Submission Information
3. NPIs that are not associated with a chain are listed in the **ERA Provider Information** section. See *Figure 5.1-1*.

The screenshot shows the Medi-Cal Rx ERA Provider Information page. At the top, there is a navigation bar with the DHCS logo, 'Medi-Cal Rx', and links for 'Document Search', 'EFT', 'ERA' (highlighted with a red box), and 'View Submissions'. Below the navigation bar, there are two tabs: '1 Provider Information' and '2 Submission Information'. The 'ERA Provider Information' section is active, displaying a search bar and a table of providers. The table has columns for 'Select All', 'Type', 'NPI', 'Owner ID', and 'Pharmacy'. There are three rows of providers, each with a 'View Details' button. A 'Hide' button is located at the top right of the table. Below the table, there is a section for 'ERA Submission Information' with a 'Show' button.

Select All	Type	NPI	Owner ID	Pharmacy
<input type="checkbox"/>	Provider	1497848832	02	SCRIPTDASH
<input type="checkbox"/>	Provider	1023279015	02	OC PHARMACY
<input type="checkbox"/>	Provider	1427486554	01	INTOUCH PHARMACY LLC

Figure 5.1-1: ERA Provider Information – Not Associated with a Chain




- Chain pharmacies can click the View NPIs button to view and select from all associated NPIs in the ERA Provider Information section. See *Figure 5.1-2*.

The screenshot shows the Medi-Cal Rx ERA Provider Information page for a chain pharmacy. The navigation bar is similar to the previous figure, but the 'ChainOnly Fullaccess' link is visible. The 'ERA Provider Information' section is active, displaying a search bar and a table of chains. The table has columns for 'Type', 'Chain ID', and 'Pharmacy'. There is one row for 'CVS PHARMACY IN TARGET' with a 'View NPIs' button highlighted by a red box. A 'Hide' button is located at the top right of the table. Below the table, there is a section for 'ERA Submission Information' with a 'Show' button.

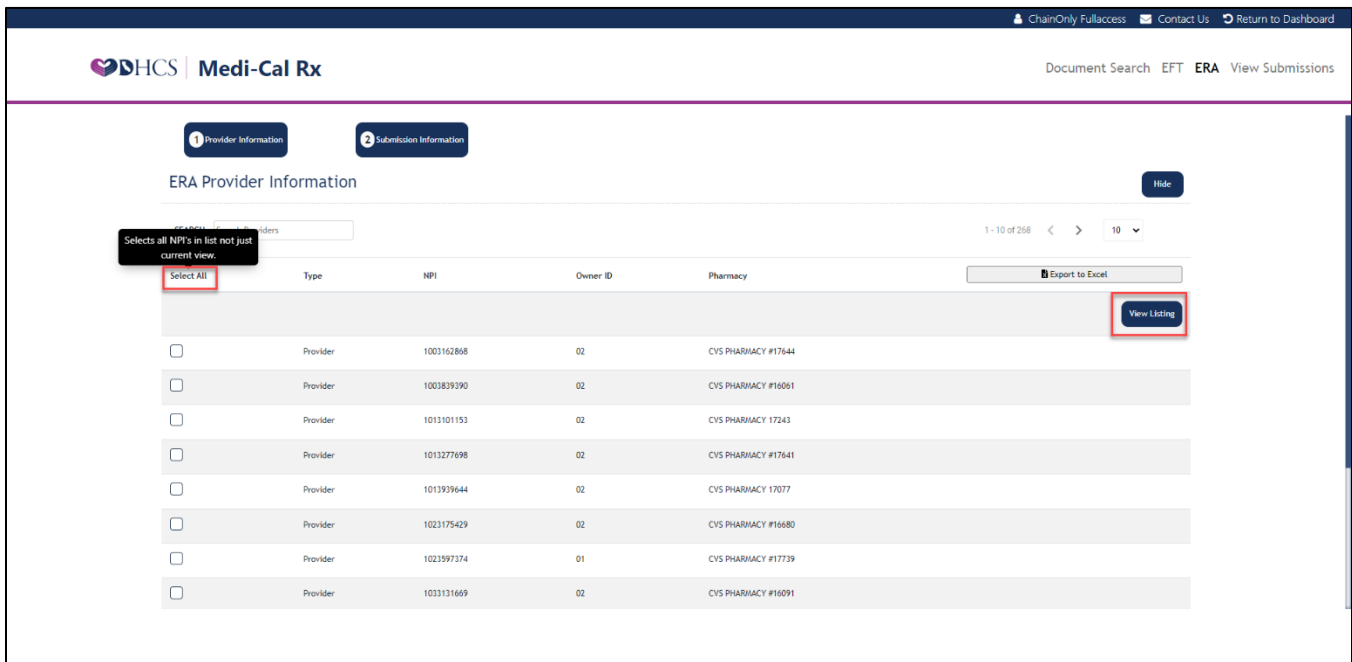
Type	Chain ID	Pharmacy
Chain	207	CVS PHARMACY IN TARGET

Figure 5.1-2: ERA Provider Information – Chains

4. Select the **Select All** link at the top of the left-hand column to select all NPIs or select the check box next to one or more individual NPIs for which you want to set up ERA. Note that using the **Select All** link will select all returned NPIs, not only those currently showing on the screen. See *Figure 5.1-3*.



- You can use the View Listing button to collapse the list and return to the Chain ID. See *Figure 5.1-3*.



The screenshot displays the 'ERA Provider Information' section of the Medi-Cal Rx portal. At the top, there are tabs for 'Provider Information' and 'Submission Information'. Below the tabs, a search bar and a 'Hide' button are visible. A table lists NPIs with columns: Type, NPI, Owner ID, and Pharmacy. The first row shows a Provider with NPI 1003162868, Owner ID 02, and Pharmacy CVS PHARMACY #17644. A 'Select All' link is highlighted in the top left of the table, and a 'View Listing' button is highlighted in the top right. A tooltip explains that 'Select All' selects all NPIs in the list, not just the current view.

Type	NPI	Owner ID	Pharmacy
Provider	1003162868	02	CVS PHARMACY #17644
Provider	1003839390	02	CVS PHARMACY #16061
Provider	1013101153	02	CVS PHARMACY 17243
Provider	1013277698	02	CVS PHARMACY #17641
Provider	1013939644	02	CVS PHARMACY 17077
Provider	1023175429	02	CVS PHARMACY #16680
Provider	1023997374	01	CVS PHARMACY #17739
Provider	103131669	02	CVS PHARMACY #16091

**Figure 5.1-3: ERA View NPIs Screen**

5. In the **ERA Submission Information** section, fill out all required fields. These fields are indicated by a red asterisk (\*) as shown in *Figure 5.1-4*.
  - c. **Note:** Hovering the mouse over the (?) next to each field will provide guidelines for the field.

**ERA Submission Information** Hide

? \* Printed Name of Person Submitting Enrollment:

? \* Printed Title of Person Submitting Enrollment:

? \* By checking this box I certify that I am authorized to make these changes and the foregoing is true and correct and I hereby authorize Medi-Cal Rx to load my 835-Transactions to Medi-Cal Rx Provider Finance Portal and acknowledge that in order to access my 835-Transactions, I must be a registered Web Portal user. ☐

Submit

**Figure 5.1-4: ERA Submission Information**

6. Click the certification and authorization check box.
7. Click **Submit** to submit the ERA request.
8. If one or more fields are incorrectly entered, the fields turn red, and a Validation Failure message appears upon submission. You will need to check the form, make the necessary corrections, and then resubmit.
9. With successful submission, you will get the message shown in *Figure 5.1-5*. Click the **Ok** button to return to the ERA View Submissions screen as shown in *Figure 5.1-6*.

Successfully saved.

Request has been successfully submitted.

Ok

**Figure 5.1-5: Successful Submission**

ChainOnly Fullaccess
Contact Us
Return to Dashboard

DHCS
Medi-Cal Rx
Document Search
EFT
ERA
View Submissions

EFT
ERA

Submission Id: 20220105084524-4c28


NPI	Owner ID	Pharmacy Name	Creation Date	Person Submitting	Action	Status
1215959846	00	TARGET PHARMACY	2022-01-05 11:29:34	Annette Bellars	SUBMIT	Approved

Submission Id: 20220110093434-9399469

NPI	Owner ID	Pharmacy Name	Creation Date	Person Submitting	Action	Status
1013277698	02	CVS PHARMACY #17641	2022-01-10 11:34:52	John Jones	CANCEL	Approved
1013101153	02	CVS PHARMACY 17243	2022-01-10 11:34:52	John Jones	CANCEL	Approved
1003839390	02	CVS PHARMACY #16061	2022-01-10 11:34:52	John Jones	CANCEL	Approved

Cancel

Figure 5.1-6: View Submissions – ERA Tab



- Once an ERA request has been submitted, approved, and is effective, from the next checkwrite cycle forward, your RA will be available as EDI 835. However, RAs generated prior to that checkwrite cycle will continue to be available as PDF files of the mailed paper versions.

## 5.2 View ERA Submissions

Users with “Finance Portal Full Access” are able to view the ERA submissions in the View Submissions section of the Medi-Cal Rx Finance Portal. The View Submissions screen lists each ERA submission and indicates which submissions have been approved or canceled. See *Figure 5.2-1*.

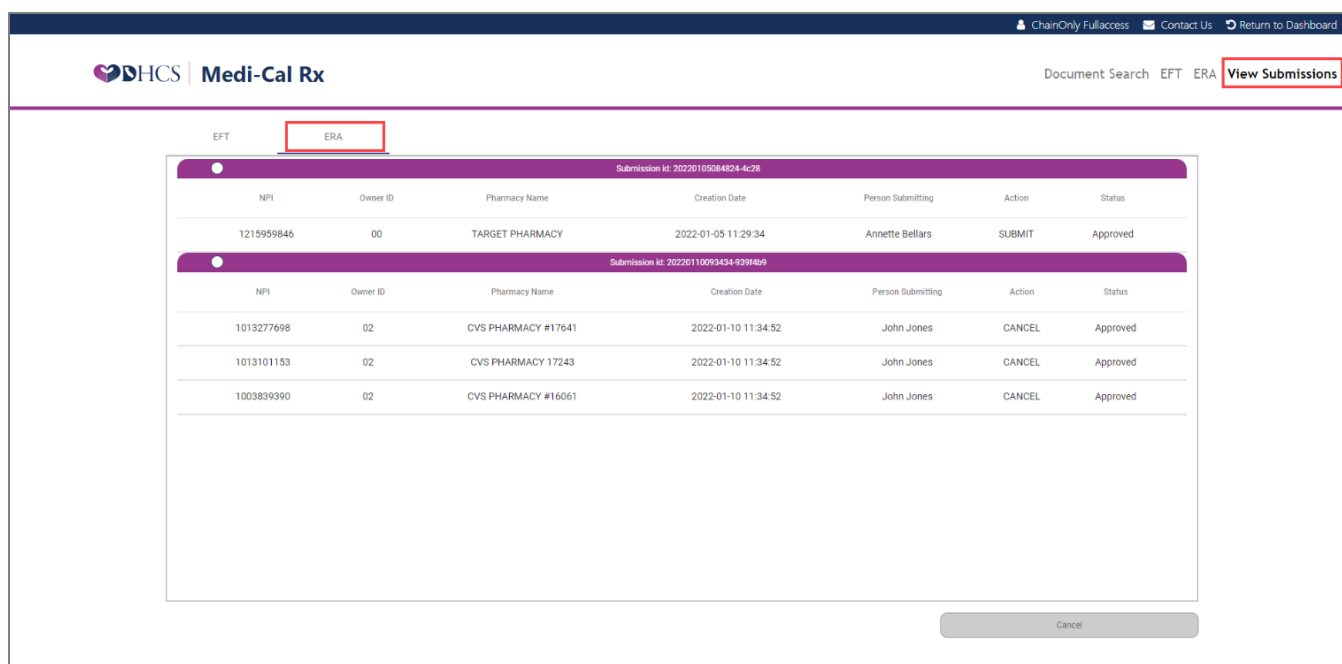


Figure 5.2-1: View Submissions – ERA Tab

## 5.3 Cancel ERA

Users with “Finance Portal Full Access” are able to cancel the submission of ERA after they have submitted the request. Allow 3-4 business days for an approved cancellation to take effect.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Select the **View Submission** option. The **ERA** tab displays a list of submissions that the user has permissions to view.
3. *Figure 5.3-1* shows an example View Submissions screen for the cancel request. By selecting the radio button in the Submission ID bar (as indicated by the check mark in *Figure 5.3-1*) for any record with an action of SUBMIT and a status of Approved, the **Cancel** button becomes active, and you can cancel the record.
  - a. **Note:** If the **Cancel** button is grayed out (for example, if the status of the selected submission is Rejected), you cannot cancel the submission.

Submission id: 20211217131051-d0b5351						
NPI	Owner ID	Pharmacy Name	Creation Date	Person Submitting	Action	Status
1003839390	02	CVS PHARMACY #16061	2021-12-17 15:10:51		SUBMIT	Approved
Submission id: 20211216081631-8815fc1						
NPI	Owner ID	Pharmacy Name	Creation Date	Person Submitting	Action	Status
1023597374	01	CVS PHARMACY #17739	2021-12-17 16:34:45		CANCEL	Approved

Cancel

**Figure 5.3-1: View Submissions Screen – Cancel Button**

- When you select the **Cancel** button, a pop-up window will appear as shown in *Figure 5.3-2*. If you select the **Yes** button to cancel the request, you will see the updated status on the View Submissions screen as shown in *Figure 5.3-3*. If you select the **No** button on the pop-up window, the record will NOT be canceled, and you will be returned to the View Submissions screen.

Are you sure you want to cancel this Record?

Selecting Yes will cancel all NPIs associated with this Submission Id.

Yes
No

**Figure 5.3-2: Cancel Confirmation**

Submission id: 20220110093434-939f4b9						
NPI	Owner ID	Pharmacy Name	Creation Date	Person Submitting	Action	Status
1013277698	02	CVS PHARMACY #17641	2022-01-10 11:34:52	John Jones	CANCEL	Approved

Cancel

**Figure 5.3-3: Canceled Record**

## 6.0 Document Search

Users with “835 File Access” or “Finance Portal Full Access” are able to search for available files and documents under the Document Search section of the Medi-Cal Rx Finance Portal. Below are instructions to search and download files and documents.

1. Log in to the Medi-Cal Rx Finance Portal by following the steps in the *Logging in to the Medi-Cal Rx Finance Portal* section of this document.
2. Refer to *Figure 6.0-1* and use the following steps to search documents.
  - a. Select the desired **Document Search** option.
    - i. To search by date, select the **Search by Date Range** radio button and enter the date range. The default date range is the previous six months.
      1. **Note:** When the **Search By Date Range** radio button is selected, the Search by Check Number option will be disabled.
    - ii. To search by number, select the **Search by Check Number** radio button and enter the check number or EFT reference number.
      1. **Note:** When the **Search By Check Number** radio button is selected, the Search by Date Range option will be disabled.
  - b. Select **835** (for the EDI 835) or **Remittance Advice** (for PDF of mailed RA).
  - c. Select **NPI** or **Chain ID**.



- Select the Chain ID radio button to return search results for a chain. See *Figure 6.0-1*.

- d. Select one or more NPIs or Chain IDs from the display list.
- e. Click the **Search** button.



The screenshot shows the 'Document Search' page of the DHCS Medi-Cal Rx portal. At the top, there is a navigation bar with the user name 'fingaprovidertestuser', a 'Contact Us' link, and a 'Return to Dashboard' link. Below this is the DHCS logo and 'Medi-Cal Rx' text. On the right side of the header, there is a red box labeled 'a' containing a right-pointing arrow, followed by the text 'Document Search', 'EFT', 'ERA', and 'View Submissions'.

The main content area is titled 'Document Search'. It features two search methods: 'Search By Date Range' (selected with a radio button and labeled 'i') and 'Search By Check Number' (unselected and labeled 'ii'). The 'Search By Date Range' section includes 'Choose a start date' (7/19/2021) and 'Choose an end date' (1/19/2022). Below this is a 'Doc Type:' section with checkboxes for '835' (labeled 'b') and 'Remittance Advice'. There are also radio buttons for 'NPI' (selected, labeled 'c') and 'Chain Id'. A dropdown menu is open, showing three options: '102327901502 - OC PHARMACY' (labeled 'd'), '142748655401 - INTOUCH PHARMACY LLC', and '149784881202 - SCRIPTDASH'. At the bottom of the dropdown is the text '(Select at least 1)'. A 'Search Q' button is at the bottom right, labeled 'e'.

Figure 6.0-1: Document Search

3. Search results are returned based on the search parameters. The search results displayed are documents available for downloading (if any). You can view and download documents from the search results. See *Figure 6.0-3*.
4. However, if you receive the message "Maximum File Size for Downloading Exceeded," then you must modify the **Search by Date Range** to reduce the date range of the search. See *Figure 6.0-2*.

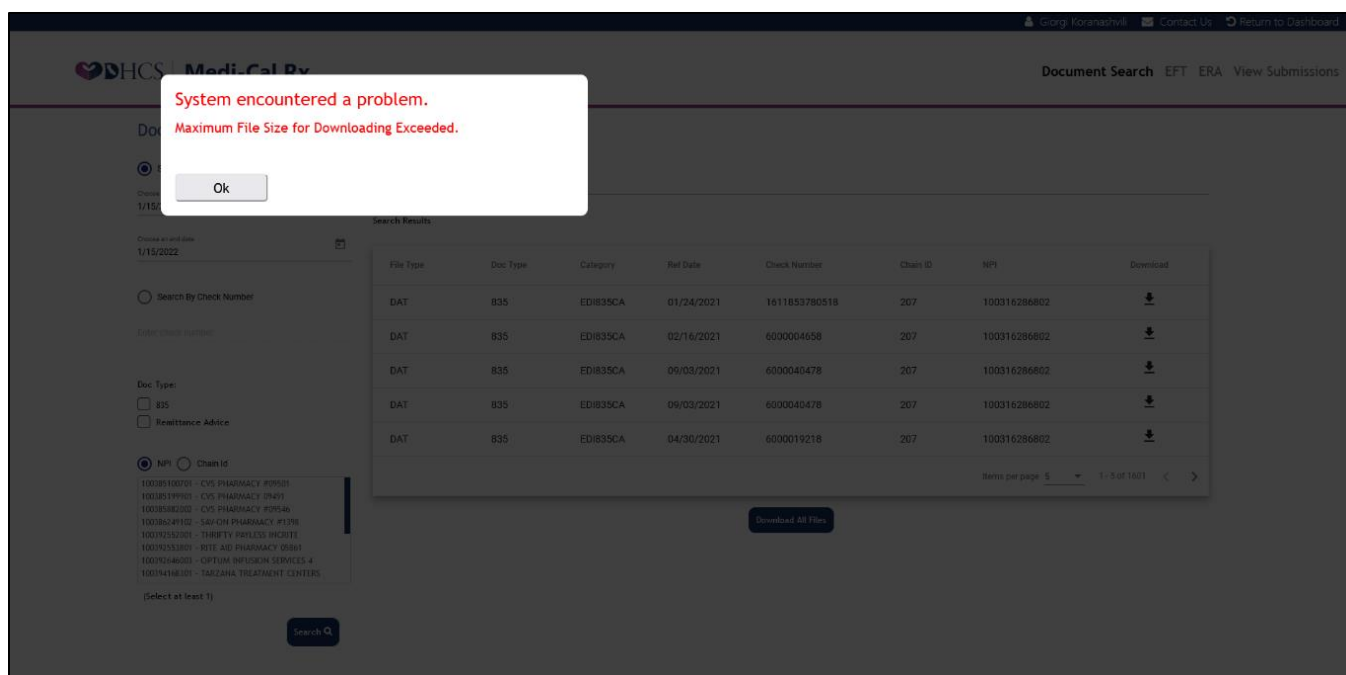


Figure 6.0-2: Document Search Results Error

- You can use the options at the bottom of the search results window to scroll through the results list and to determine how many records are displayed per page. You can click the column headers in the search results to change the sort order. Note that the **Ref Date** column reflects the payment date.
- Click the arrow next to a document to download that individual document, or select the **Download All files** button to download all documents returned by the search as a .zip file. Note that selecting this button will download all files in the list, not only in the current view.
- If the number of files returned in the search exceeds the maximum limit of 5000, then you must select **Load Next** to return additional results and download them. Repeat Step 4(b) to download.
  - Note:** The **Load Next** button will only be present if the number of files exceeds 5000-file limit.
- Follow the on-screen download instructions.
- You can print or save the document based on your needs.

ChainOnly Fullaccess

Contact Us

Return to Dashboard

DHCS | Medi-Cal Rx

Document Search EFT ERA View Submissions

Document Search

Search By Date Range

Choose a start date

1/15/2014

Choose an end date

1/15/2022

Search By Check Number

Enter check number

Doc Type:

835

Remittance Advice

NPI

Chain Id

207 - CVS PHARMACY IN TARGET

(Select at least 1)

Search

Filter

Search Results

File Type	Doc Type	Category	Ref Date	Check Number	Chain ID	NPI	Download
DAT	835	EDI835CA	01/24/2021	1611853780518	207	100316286802	
DAT	835	EDI835CA	02/16/2021	6000004658	207	100316286802	
DAT	835	EDI835CA	02/16/2021	6000004681	207	100383939002	
DAT	835	EDI835CA	02/16/2021	6000005626	207	101327769802	
DAT	835	EDI835CA	02/16/2021	6000005650	207	101393964402	

a

Items per page 5 1 - 5 of 500

b

Download All Files

c

Load Next

Figure 6.0-3: Document Search Results